

# ADDING OR FINDING A CLIENT OR A HOUSEHOLD IN WISCONSIN SERVICEPOINT

## 1. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

**Add as New / Search for Existing Client**

Last Profile: -Select-

First \*: Make MI: [ ] Last \*: Believe Suffix: [ ]

SS# \*: [ ] - [ ] - [ ]

SSN Data Quality: -Select-

Date of Birth 2.3: [ ] (mm/dd/yyyy)

Gender: - Select -

Race: - Select -

Search Filter: [ ] Exact Match?

**Add / Find Client** **Add As Anonymous Client**

\* - Searchable Field

## 2. Click Add/ Find Client

## 3. Check to see if there are any matching clients in POSSIBLE MATCHES.

If NO MATCHING CLIENT,

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

**Possible Matches** (*refine your results or add as new below*)

Name	SS#	Date of Birth	Gender	Banned
No matching Clients found.				

showing 0-0 of 0

Then Click “ADD CLIENT WITH THIS INFORMATION”

Search Filter: [ ] Exact Match?

Refine Search Criteria **Add Client With This Information**

\* - Searchable Field

AND

Microsoft Internet Explorer

About to add this client as New. (Be sure to look through all the possible matches before continuing this process.) Continue with Add New Client?

**OK** Cancel

If THERE IS A MATCHING CLIENT, CLICK ON THE NAME OF THE CLIENT

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

**Possible Matches** (*refine your results or add as new below*)

Name	SS#	Date of Birth	Gender	Banned
<a href="#">Believe, Make</a>				

showing 1-1 of 1

4. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the HUD UNIVERSAL DATA ELEMENTS ASSESSMENT questions.

The screenshot shows the ServicePoint web application interface. At the top, the header includes the ServicePoint logo, the text "Connecting your community.", and the user information "WI Department of Commerce, Bureau of Housing Aug 10, 2005" and "WI Department of Commerce / Madison". A navigation bar contains links: Home, ClientPoint (circled), ResourcePoint, ShelterPoint, Reports, Admin, Help, and Logoff. Below this is a sub-navigation bar with Profile (circled), Assessments, Case Plans, and Service Transactions. The main content area is titled "Client - Believe, Make (#4049)" and "Release of Info: None". It features a "Client Profile" section with a "Save Changes" button and "Exit" button. The profile information includes "Added to System" date and time, and fields for First Name (Make), MI, Last Name (Believe), and Suffix. Below these are fields for SS#, SSN Data Quality (a dropdown menu), and Age. The "HUD Universal Data Elements" section contains a "Save Changes" button and a "Back Date" button. It lists several assessment questions with dropdown menus for answers. Arrows point to the dropdown menus for "Date of Birth 2.3", "Ethnicity 2.4.1", "Race", "Secondary Race (if provided)", "Gender", "Is Client U.S. Military Veteran?", "Do you have a disability of long duration? 2.7", "Type of Living Situation 2.8", "Length of Stay", "Zip Code of Last Permanent Address 2.9", and "Zip data quality". The "Save Changes" button at the bottom of the HUD Universal Data Elements section is circled, with an arrow pointing to it from the instruction below.

ServicePoint™  
Connecting your community.

WI Department of Commerce, Bureau of Housing Aug 10, 2005  
WI Department of Commerce / Madison

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

Profile Assessments Case Plans Service Transactions

Client - Believe, Make (#4049)  
Release of Info: None

ENTRY/EXIT ROI RESOURCE PT CASE WORKERS SECURITY

Client Profile

Save Changes Exit

Added to System Aug 10 2005 02:54PM

First Make MI Last Believe Suffix

SS# - -

SSN Data Quality -Select-

Age

HUD Universal Data Elements

Save Changes

Assessment Date 08/10/2005 02 : 07 PM Back Date

Items in red are HUD universal data elements.

Date of Birth 2.3 (mm/dd/yyyy) H G

Ethnicity 2.4.1 - Select - H G

Race - Select - H G

Secondary Race (if provided) - Select - H G

Gender - Select - H G

Is Client U.S. Military Veteran? - Select - H G

Do you have a disability of long duration? 2.7 - Select - H G

Below indicate where the client spent the night prior to entering your program.

Type of Living Situation 2.8 - Select - H G

Length of Stay - Select - H G

Zip Code of Last Permanent Address 2.9 H G

Zip data quality - Select - H G

HUD Universal Data Elements

Save Changes

5. Click "SAVE CHANGES"

**NOTE:**

- If the **CLIENT** is **SINGLE**, GO TO RELEVANT SERVICE RECORD.
- If the **CLIENT** is in a **HOUSEHOLD**, **CREATE HOUSEHOLD** (follow steps below)

**6. CLICK “ADD THIS CLIENT TO HOUSEHOLD”**

Households Containing Make Believe

Household Type	Clients in Household	Relationship	Date Entered	Date Removed	Head of Household
No Households found for this client.					

Add this client to Household

**7. Answer the question about who the CLIENT in the HOUSEHOLD, the Click “START NEW HOUSEHOLD”**

Add Client to Household - (Make Believe)

Household Type (if starting new household): Single Parent

Head of Household: Yes

Relationship to Head of Household: mother

Date Entered: 08/10/2005 (mm/dd/yyyy)

Date Removed: (mm/dd/yyyy)

Start NEW Household Add to EXISTING Household Cancel

**8. Put in the FIRST & LAST NAMES of the HOUSEHOLD MEMBER**

(Note: Do not fill in any other data element.)

Add Clients To Household - (Make Believe)

Overview - Type: Single Parent, # Clients: 1 Edit Household Type

Name	Relationship	Date Entered	Date Removed	Head of Household
Believe, Make	mother	08/10/2005		Yes

Add Additional Clients to Household

First \* Ida MI Last \* Believe Suffix

SS# \* - - -

SSN Data Quality -Select-

Date of Birth

**9. Click Add/ FindClient**

Search Filter ☐ Exact Match?

Add / Find Client Add As Anonymous Client

\* - Searchable Field

10. Check to see if there are any matching clients in POSSIBLE MATCHES.

If NO MATCHING CLIENT,

The screenshot shows a web application window titled "Add Clients To Household - (Make Believe)". It has two main sections. The top section, "Overview - Type: Single Parent, # Clients: 1", contains a table with one row: Name "Believe, Make", Relationship "mother", Date Entered "08/10/2005", Date Removed (empty), and Head of Household "Yes". The bottom section, "Possible Matches (refine your results or add as new below)", contains a table with columns Name, SS#, Date of Birth, and Gender. The text "No matching Clients found." is displayed in the table area. At the bottom right of this section, it says "showing 0-0 of 0".

Then Click “ADD CLIENT WITH THIS INFORMATION”

This screenshot shows a search filter area with a "Search Filter" label and an "Exact Match?" checkbox. Below this is a "Refine Search Criteria" section. A button labeled "Add Client With This Information" is highlighted with a red oval. A red arrow points from this button to the "AND" text between the two screenshots.

AND

This screenshot shows a confirmation dialog box from Microsoft Internet Explorer. It contains a question mark icon and the text: "About to add this client as New. (Be sure to look through all the possible matches before continuing this process.) Continue with Add New Client?". There are two buttons at the bottom: "OK" and "Cancel". The "OK" button is highlighted with a red oval.

If THERE IS A MATCHING CLIENT,

This screenshot shows the same "Add Clients To Household - (Make Believe)" window as before. In the "Possible Matches" section, the table now has one row: Name "Believe, Ida" (highlighted with a red oval and a red asterisk), SS# (empty), Date of Birth (empty), and Gender (empty). The text "showing 1-1 of 1" is at the bottom right of this section.

CLICK ON THE NAME OF THE CLIENT

11. Fill Out “CONTINUE ADDING THE HOUSEHOLD MEMBER”

This screenshot shows a form titled "Continue Adding Household Member". It contains several fields: "Client" (filled with "Believe, Ida"), "Head of Household" (a dropdown menu with "No" selected), "Relationship to Head of Household:" (a dropdown menu with "daughter" selected), "Date Entered" (filled with "08/10/2005"), and "Date Removed" (empty). At the bottom, there are two buttons: "Add Household Member" (highlighted with a red oval) and "Cancel".

12. Click “ADD HOUSEHOLD MEMBER”

### NOTE

- If the **HOUSEHOLD IS COMPLETE** , then *(follow steps below)*
- If there are **MORE CLIENTS IN HOUSEHOLD**, then “**ADD ADDITIONAL CLIENTS TO HOUSEHOLD** by repeating Steps 8 -12 until Household is complete.

**Add Clients To Household - (Make Believe)**

**Overview - Type: Single Parent, # Clients: 2** Edit Household Type

	Name	Relationship	Date Entered	Date Removed	Head of Household
	Believe, Ida	daughter	08/10/2005		No
	Believe, Make	mother	08/10/2005		Yes

**Add Additional Clients to Household**

**NOTE:** For every individual entered into the hold complete *Steps 13 - 17*

### 13. Put in the FIRST & LAST NAMES of the CLIENT

*(Note: Do not fill in any other data element.)*

Home | ClientPoint | ResourcePoint | ShelterPoint | Reports | Admin | Help | Logoff

**Add as New / Search for Existing Client**

Last Profile: -Select-

First \*: Make MI ☐ Last \*: Believe Suffix:

SS# \*: - - -

SSN Data Quality: -Select-

Date of Birth:  (mm/dd/yyyy)

2.3

Gender: - Select -

Race: - Select -

Search Filter ☐ Exact Match?

Add / Find Client Add As Anonymous Client

\* - Searchable Field

### 14. Click Add/ Find Client

### 15. LOOK FOR CLIENT in POSSIBLE MATCHES – *(note: if it is not here you made a mistake).*

Home | ClientPoint | ResourcePoint | ShelterPoint | Reports | Admin | Help | Logoff

**Possible Matches** *(refine your results or add as new below)*

	Name	SS#	Date of Birth	Gender	Banned
*	Believe, Make				

showing 1-1 of 1

**CLICK ON THE NAME OF THE CLIENT**

16. You will automatically go to the **PROFILE PAGE** of **CLIENTPOINT**, where you should answer all of the **HUD UNIVERSAL DATA ELEMENTS ASSESSMENT QUESTIONS**.

**ServicePoint™** WI Department of Commerce, Bureau of Housing Aug 10, 2005  
 WI Department of Commerce / Madison

Home ClientPoint ResourcePoint ShelterPoint Reports Admin Help Logoff

Profile Assessments Case Plans Service Transactions

**Client - Believe, Make (#4049)**  
 Release of Info: **None**

ENTRY/EXIT ROI RESOURCEPT CASE WORKERS SECURITY

**Client Profile** Save Changes Exit

Added to System Aug 10 2005 02:54PM

First  MI ☐ Last  Suffix

SS#  -  -

SSN Data Quality

**HUD Universal Data Elements** Save Changes

**Assessment Date** 08/10/2005 02 : 07 PM Back Date

Items in red are HUD universal data elements.

**Date of Birth 2.3**  (mm/dd/yyyy) H G

**Ethnicity 2.4.1**  H G

**Race**  H G

Secondary Race (if provided)  H G

**Gender**  H

**Is Client U.S. Military Veteran?**  H

**Do you have a disability of long duration? 2.7**  H G

Below indicate where the client spent the night prior to entering your program.

**Type of Living Situation 2.8**  H G

**Length of Stay**  H G

**Zip Code of Last Permanent Address 2.9**  H G

**Zip data quality**  H G

**HUD Universal Data Elements** Save Changes

17. Click “**SAVE CHANGES**”

**NOTE:** For every **CLIENT** IN THE **HOUSEHOLD**, the **HUD UNIVERSAL DATA ELEMENTS ASSESSMENT** should be **COMPLETED**. When all assessments are completed for everyone in the household, go to the relevant record of service.